Payroll User Group Meeting

Wednesday March 11, 2009

9:30 A.M. – 12:30 P.M.

Welcome

Kevin McHugh – Payroll Bureau Director

Massachusetts State Employee Credit Union

Ed Connors

Year End 2008 Metrics

- W2s printed **96,808** (vs **94,907** in ‘07)
- Check Reversals **1,386** (vs. **1,338**)
- Tax Balance Adjustments **3,096** (vs. **3,111**)
- $ Federal tax withholdings **$502M** ($ **485M**)
- $ Medicare taxes paid **$52.1M** ($ **43.7M**)

Year End 2008

- What additional tools do you want/need? (IE. Queries, Reports, Notices, etc.)
- Do you have suggestions for improving the Year End Process, balances and W2's?

THE AMERICAN RECOVERY AND REINVESTMENT ACT OF 2009

Provisions Impacting Payroll for the Commonwealth

“Making Work Pay” Tax Credit

- For tax years 2009 & 2010 this provision allows for a refundable 6.2% tax credit for earned income up to a max of $400 (Single) and $800 (Married)
- Increase to your net pay through revised Withholding tables see: http://www.irs.gov/pub/irs-pdf/n1036.pdf
- No new W4 needed – (higher tax brackets had no change)
- Beware of Adjusted Gross Income if Single earning >$75K or Married >$150K – may not have sufficient Withholdings taken

Earned Income Tax Credit

- Temporary Increase to Earned Income Tax Credit
  - Current Law - Working families with 2+ children qualify for an EI tax credit = to 40% of the family's 1st $12,570 of EI
  - Revised Law - Working families with 3+ children qualify for an EI tax credit = 45% of the family's first $12,570 of EI

Increase in Commuter Transportation Benefit

- Effective March 2009: The Excludable Benefit for Commuter Highway Vehicle Transportation and Transit passes Increased to $230 from $120 in 2008
  - @1600 employees to save @ $17 a month in taxes

- The exclusion for Qualified Parking remains the same for 2009 at $230

Sources

- FULL SUMMARY OF PROVISIONS FROM SENATE FINANCE, HOUSE WAYS & MEANS COMMITTEES

  http://finance.senate.gov/press/Bpress/2009press/prb021209.pdf
- IRS Publication 15-T (Rev. March 2009) http://www.irs.gov/pub/irs-pdf/p15t.pdf
- IRS Publication 15-B For Use in 2009

  http://www.irs.gov/pub/irs-pdf/p15b.pdf

Health Care Connector

Cheryl Ierna

Open Enrollment

- Notices to Employees @ March 27
- Website Updated for shopping for coverage May 1st – 29th for July 1st or August 1st effective dates
- New for this year – Health Care Alternative for Employees Leaving State Service (COBRA)

OPEN ENROLLMENT

May 1st – 29th for July 1st or August 1st effective dates*

Health Insurance for Non-GIC Eligible Commonwealth Employees

Commonwealth Choice

Your Connection to Good Health

If you are not eligible to receive state-subsidized health insurance through the Group Insurance Commission (GIC), you can purchase health insurance on a pre-tax basis from the state's Health Connector Commonwealth Choice programs. Commonwealth Choice offers a broad selection of brand-name health plans. All have earned the Health Connector's Seal of Approval for affordability and quality.

*For more information about eligibility, enrollment and effective dates of coverage, visit the GIC website at mass.gov/gic/.

To learn more about Commonwealth Choice options -

1. **Go to MAhealthconnector.org or call 1-877-MA-ENROLL (1-877-623-6765)**
2. **Click on the "Employees" picture. You will be prompted for an Employer Identification Number – the Commonwealth of MA Employer ID# is 149683.**
3. **Compare benefits, prices and enroll**
4. **Once you enroll, the Commonwealth will begin making pre-tax deductions from your bi-weekly paycheck**

MASSACHUSETTS

fallon community health plan

Harvard Pilgrim Health Care

HNE HEALTH NEW ENGLAND

Neighborhood Health Plan *Getting better together.*

TUFTS Health Plan *No one does more to keep you healthy.*

Remember... Most Massachusetts residents age 18 or older must have health insurance or pay a significant tax penalty.

To learn more...Go to www.MAhealthconnector.org.

Or call 1-877-MA-Enroll (1-877-623-6765) Monday-Friday 8am to 6pm.

The TTY for hearing or speech-impaired callers is 888-213-2763.

All calls are free and private. We offer services for non-English-speaking callers.

HEALTH INSURANCE ALTERNATIVE

For Massachusetts Residents Leaving State Service

Commonwealth Choice

Your Connection to Good Health

Are you a Massachusetts resident leaving state service? Even if you are eligible to continue your GIC health insurance coverage through the state's 39 week layoff coverage and/or COBRA, the state's Health Connector has other health insurance options that may be a **better fit** for your needs and budget. Commonwealth Choice offers a broad selection of brand-name health plans. All have earned the Health Connector's **Seal of Approval** for affordability and quality. And unlike COBRA coverage, you can keep Commonwealth Choice for as long as you need it.

GET STARTED

1. **Go to MAhealthconnector.org or call 1-877-MA-ENROLL (1-877-623-6765) to learn about your Commonwealth Choice options.**
2. **Compare benefits and prices.**
3. **Choose the plan that is right for you.**

YOU HAVE OPTIONS

Your Commonwealth Choice premium could be **lower** than your COBRA, layoff or conversion coverage. Depending on which plan you choose, your age and location, **Commonwealth Choice could save you hundreds and possibly thousands of dollars a year.** For example, for a 40 year-old living in Boston the monthly cost of a comprehensive Commonwealth Choice plan could be approximately 35% to 70% (single coverage) and 20% to 65% (family coverage) lower than COBRA.

CHOOSE FROM: MASSACHUSETTS, fallon community health plan, Harvard Pilgrim HealthCare, HNE, Neighborhood Health Plan *Getting better together.*, TUFTS Health Plan *No one does more to keep you healthy.*

Remember... Most Massachusetts residents age 18 or older must have health insurance or pay a significant tax penalty.

To learn more...Go to www.MAhealthconnector.org.
Or call 1-877-MA-Enroll (1-877-623-6765) Monday-Friday 8am to 6pm.
The TTY for hearing or speech-impaired callers is 888-213-2763.

Connector Deductions

- CCAHI is scheduled for all pay periods except 1/17/09 (last time), 8/15/09, and 1/22/10.
- The *skip* period is the period before the assigned HRCMS ‘3rd pay period’.

GIC Update

- GIC annual enrollment dates are April 13-May 15 for changes effective July 1, 2009.
- April 7-April 14 Seven Coordinator training sessions at the beginning of April and will discuss important changes and procedures for annual enrollment
- Remember to RSVP to the GIC!

2009 HIRD Information

- Continue collecting HIRD forms.
- Report **MBEN021R:** Departmental HIBO
- How useful is this Report / Process?

HR/CMS Upgrade and Beyond

Paul Dietl, Chief Human Resource Officer

Martin Benison, Comptroller

Richard Divosevic, Program Manager

HR/CMS Upgrade

- Goals and Vision
- Team
- Timeline
- Highlights of Future Functionality
- Department Input

Mission Statement

- ***Project Mission Statement***

  Upgrade HR/CMS from release v8.0 SP1 to release v9.0 MP5 within fiscal 2010 with little to no disruptions to business operations. Employ efficient and expedient measures to keep the project on schedule and minimize customization to the v9.0 delivered product to deliver the foundation for additional new PeopleSoft functionality in the future.

Business Drivers

- PeopleSoft Upgrade is needed to maintain a supported version of the software as well as potentially take advantage of newer and expanded functionality and enhancements
- The Commonwealth needs to minimize the total cost of ownership and maximize it ability to take advantage of new functionality in future releases. A key component of this strategy is products including the overall cost of future upgrades so they can be supported in the annual operating budget
- Improve efficiency and reduce burden of administrative processes
- Leverage technology to achieve efficient processes
- Provide the foundation to implement self-service in the future for employees and managers

Business Drivers

- Expand technology for HR functions statewide as well as to support department-specific needs and objectives.
- Eliminate as much as practical silos of disparate data in multiple non-integrated systems into a system that will provide accurate and timely HR data and enhance our ability to more effectively manage our workforce.
- Support Secretariat Consolidation, one of the seven key initiatives of the IT Strategy for the Commonwealth FY 2009 to 2011 (published August 2008)
- Support Systems Modernization, one of the four supporting initiatives of the IT Strategy for the Commonwealth FY 2009 to 2011 (published August 2008

Executive Committee

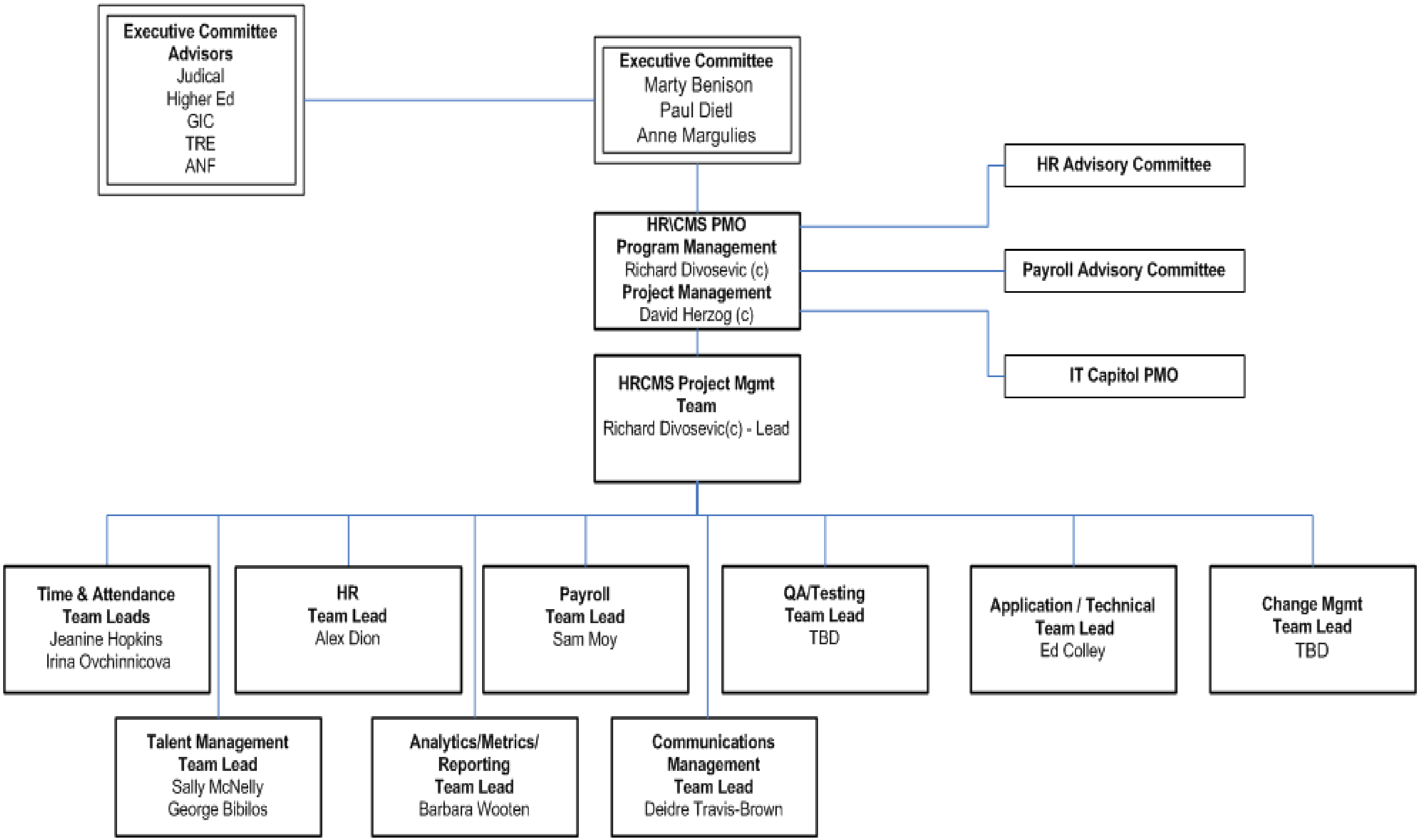
Martin Benison, Comptroller

Paul Dietl, Chief Human Resources Officer

Anne Margulies, Assistant Secretary and CIO

Program Manager - Richard Divosevic

HR/CMS Program Organization Chart

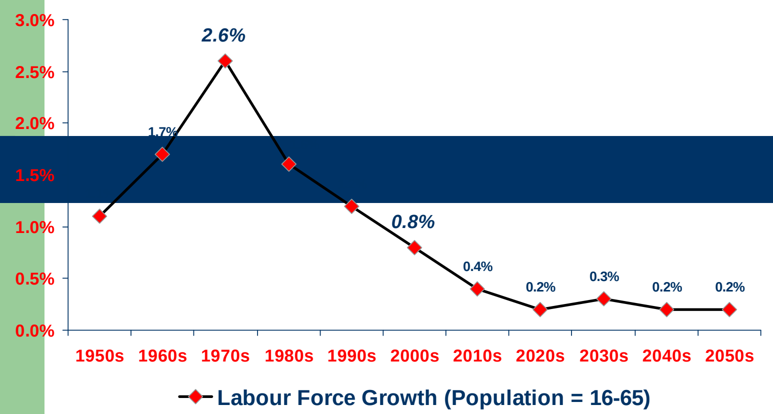


HR/CMS PeopleSoft 9.0 Upgrade
High-Level Timeline

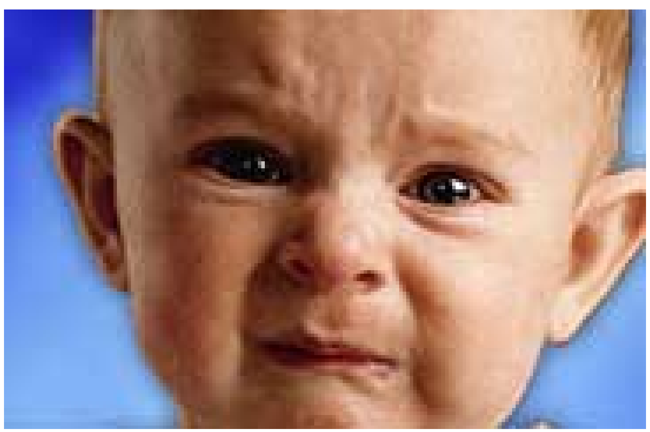
	Fiscal Year 2009							Fiscal Year 2010								
	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Strategy	X	X														
Planning		X	X	X	X											
Structure			X	X	X	X	X									
Construct				X	X	X	X	X	X	X	X					
Transition										X	X	X	X	X	X	
Deploy														X	X	X
Begin Post-Production Support																X

Current HR Challenges

Shrinking Workforce



Multiple Generations



Disengaged Employees

Leadership Development

From Oracle:

What are the key questions?

- What customers are telling us…
  - “Help leaders manage the workforce to maximize effectiveness of the workforce to achieve mission delivery.”
  - “Transactional efficiency to reduce costs.”

Having the right talent in the right roles *drives* future success!

Our Vision: Integrated TM System

TM =

- Attract Best Talent
- Develop employee Talent and provide career paths
- Enhance supervisor and manager leadership competencies
- High levels of Employee engagement
- Improve mission delivery to citizens

Shared Services

Data key to measure HR impact

LESS IS MORE

Less Customizations

=

Lower Upgrade Costs

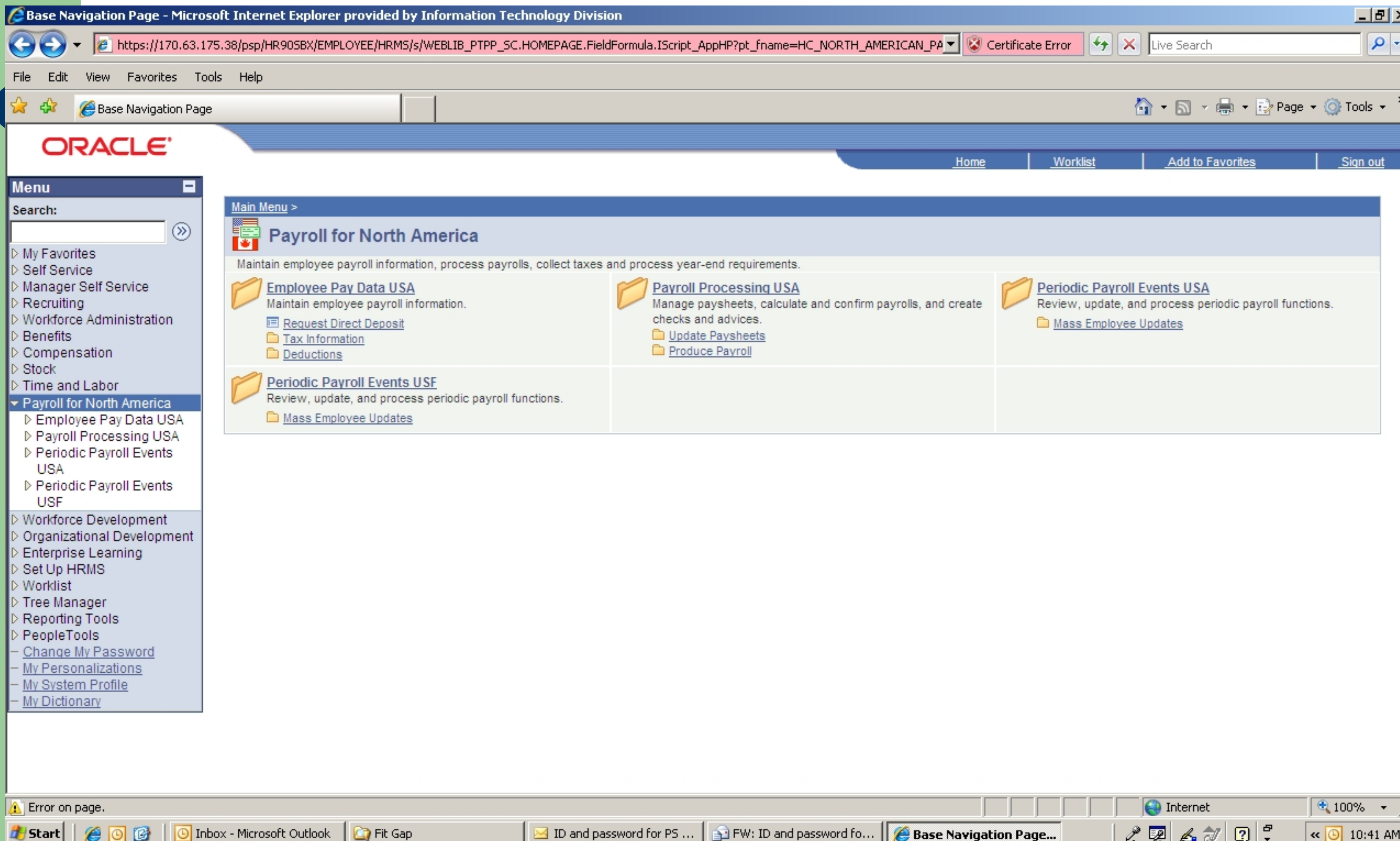
WHY

More likely to upgrade when business case is made

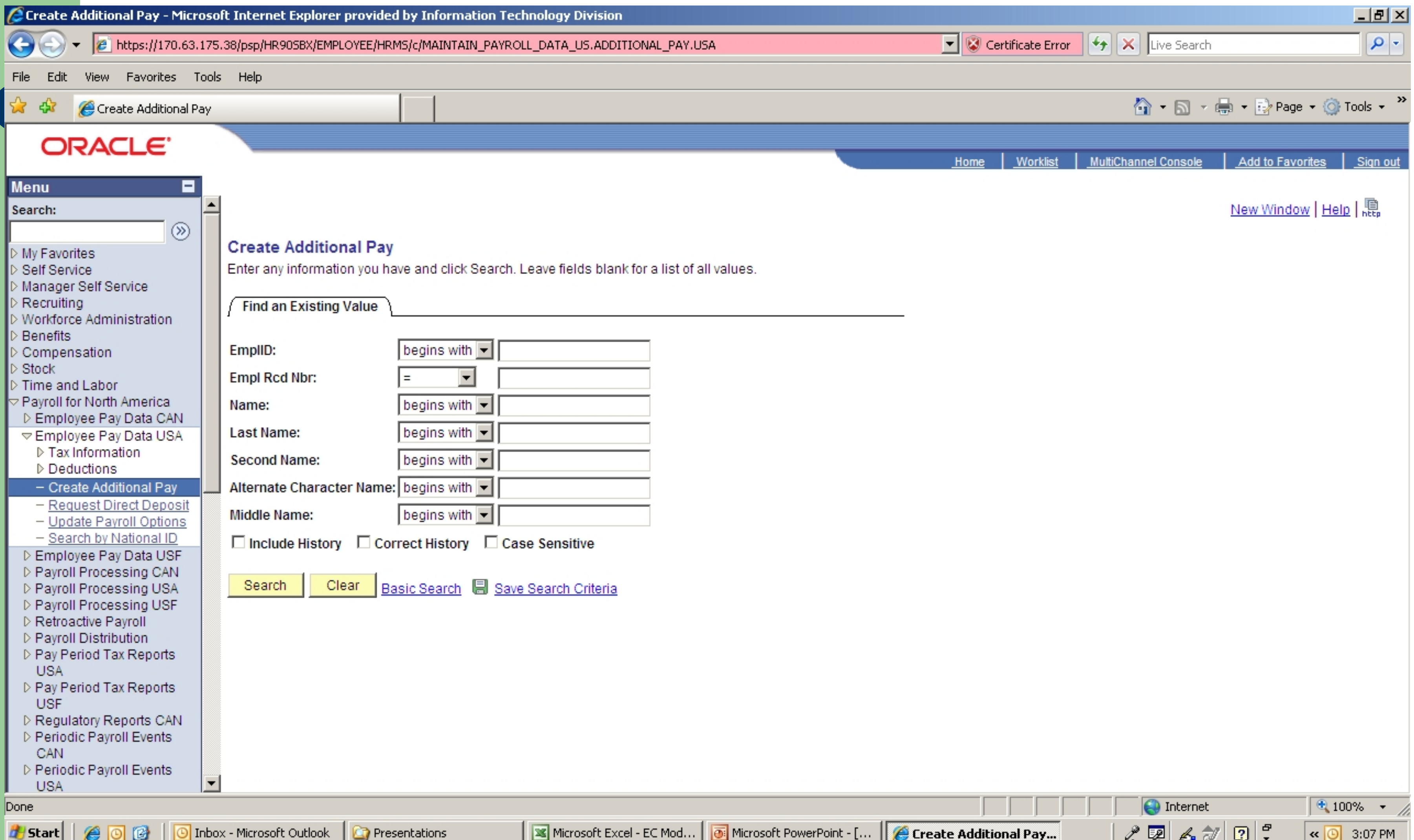
Key Functionality by Release
What The Commonwealth Missed Along the Way

	8.3	8.8	8.9	9.0
Core Changes	• FSA Claims Admin • Deferred Processing • Manage Professional Compliance	• Portal Navigation • Tools 8.4x • Commitment Accounting	• Person Model • Security Architecture • Labor Management	• Profile Mgmt • Approvals/ Delegation • Smart Hire
New Products	• HRMS Portal Pack • Directory Interface • Mass Update	• ePerformance • Enterprise Learning Management • HR HelpDesk	• Absence Management	• Workforce Scheduling • BI Publisher
Enhanced Products	• Collaborative Apps • Recruiting Solutions • Commitment Acctg • Workforce Analytics • Payroll	• Payroll	• ePerformance • Recruiting Solutions • Benefits • Time and Labor • Analytics	• Learning Mgmt • Analytics

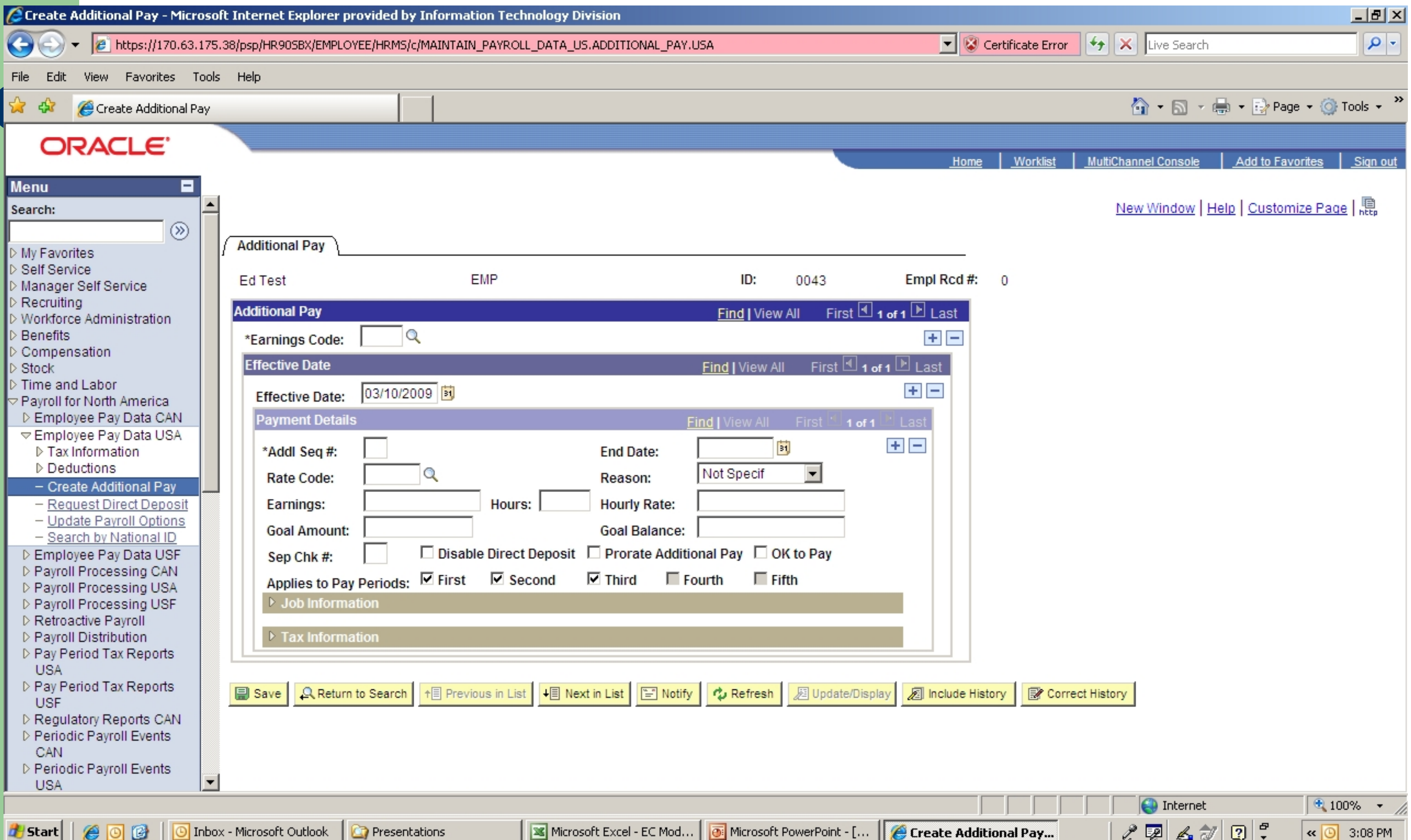
PeopleSoft 9.0 Home Menu



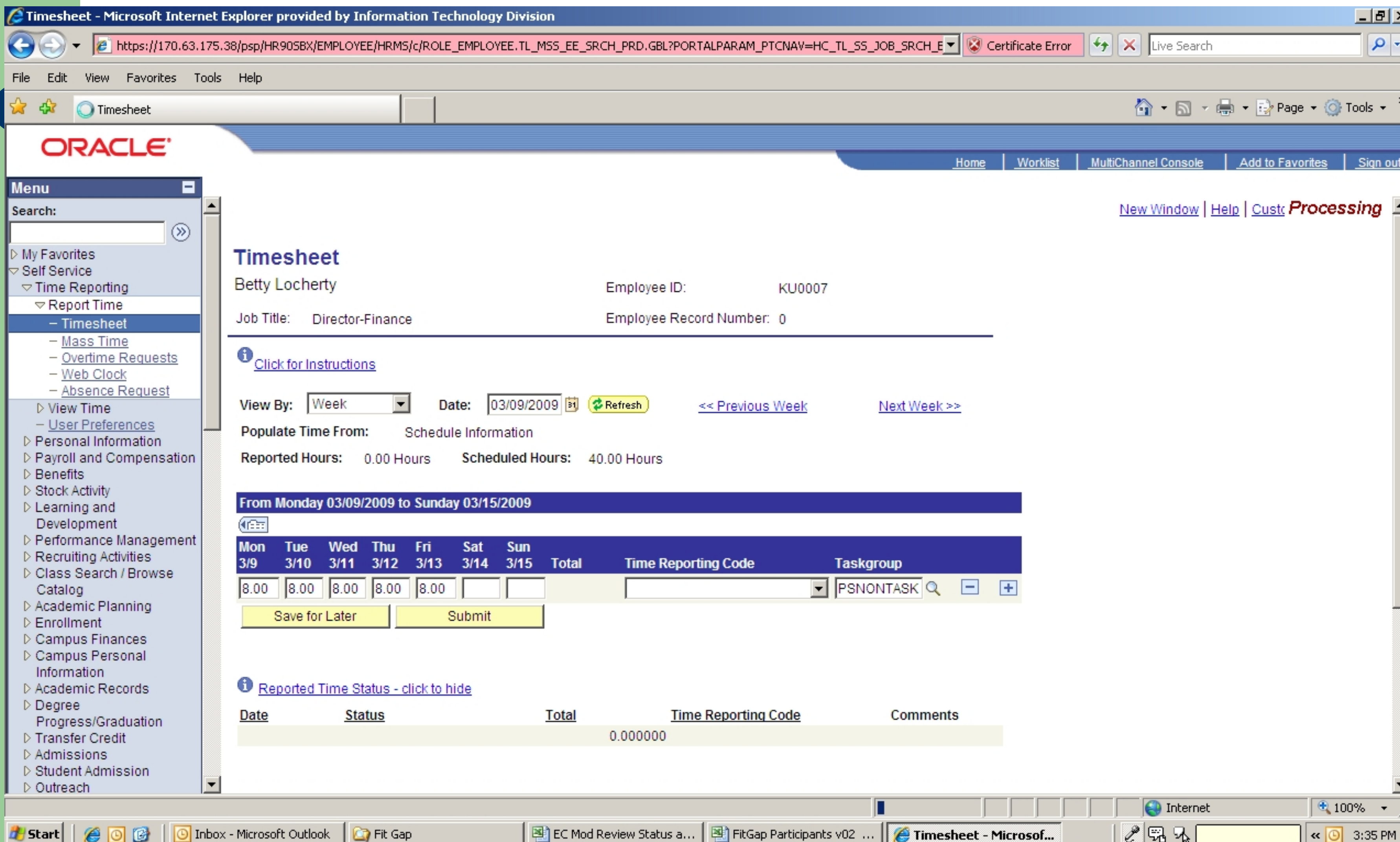
PeopleSoft 9.0 Additional Pay



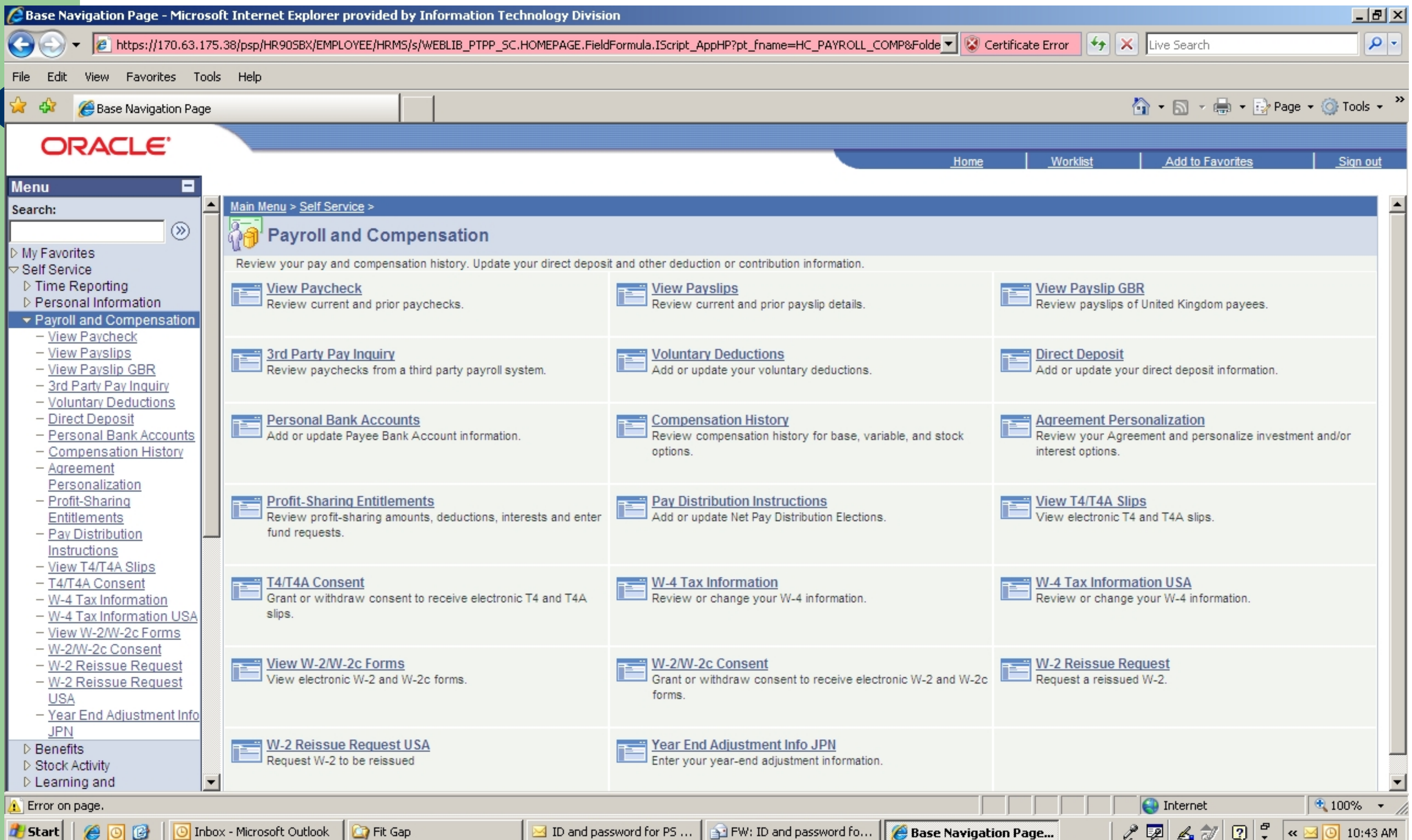
PeopleSoft 9.0
Create Additional Pay



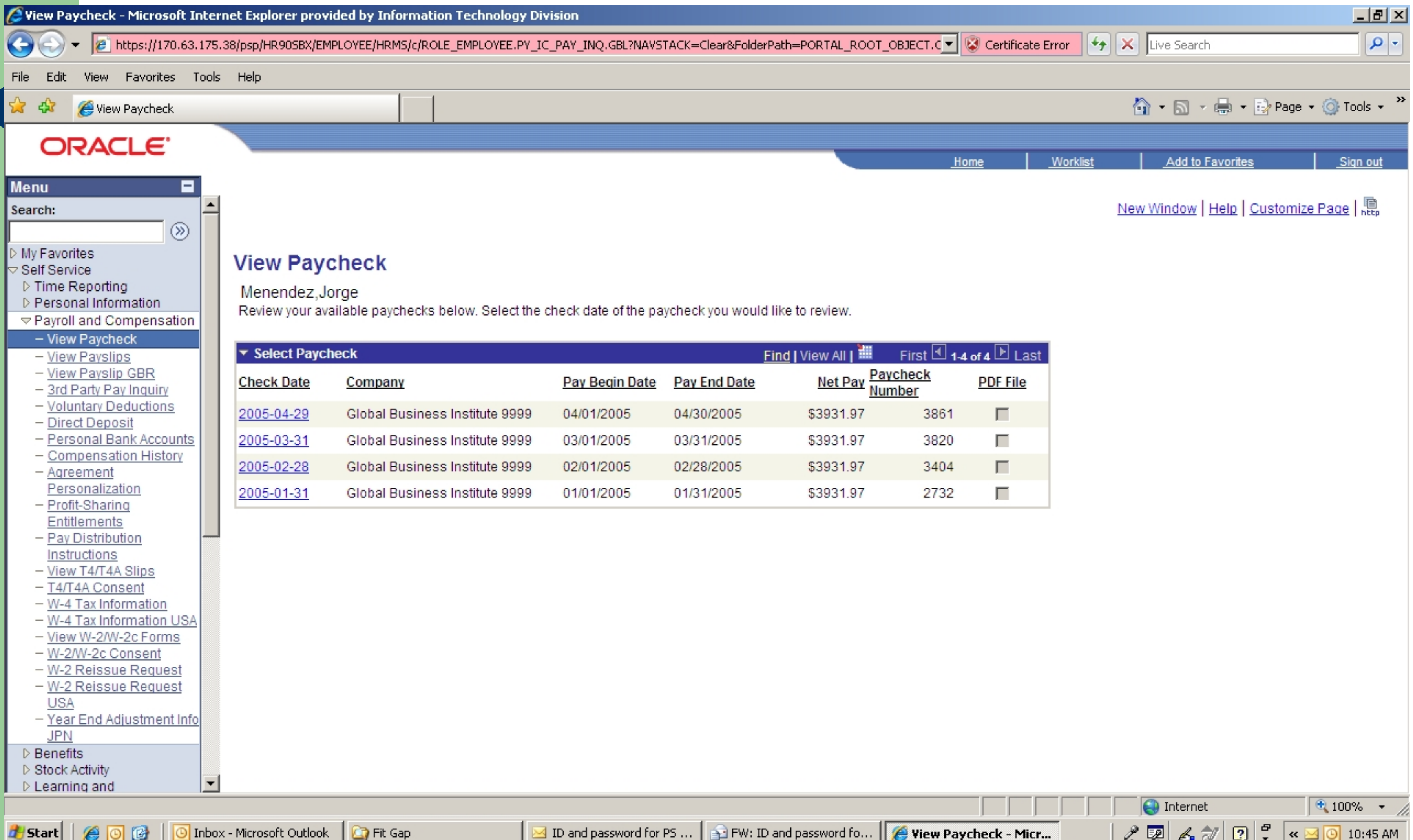
PeopleSoft 9.0
Employee Report Elapsed Time



PeopleSoft 9.0
Payroll Self-Service Menu

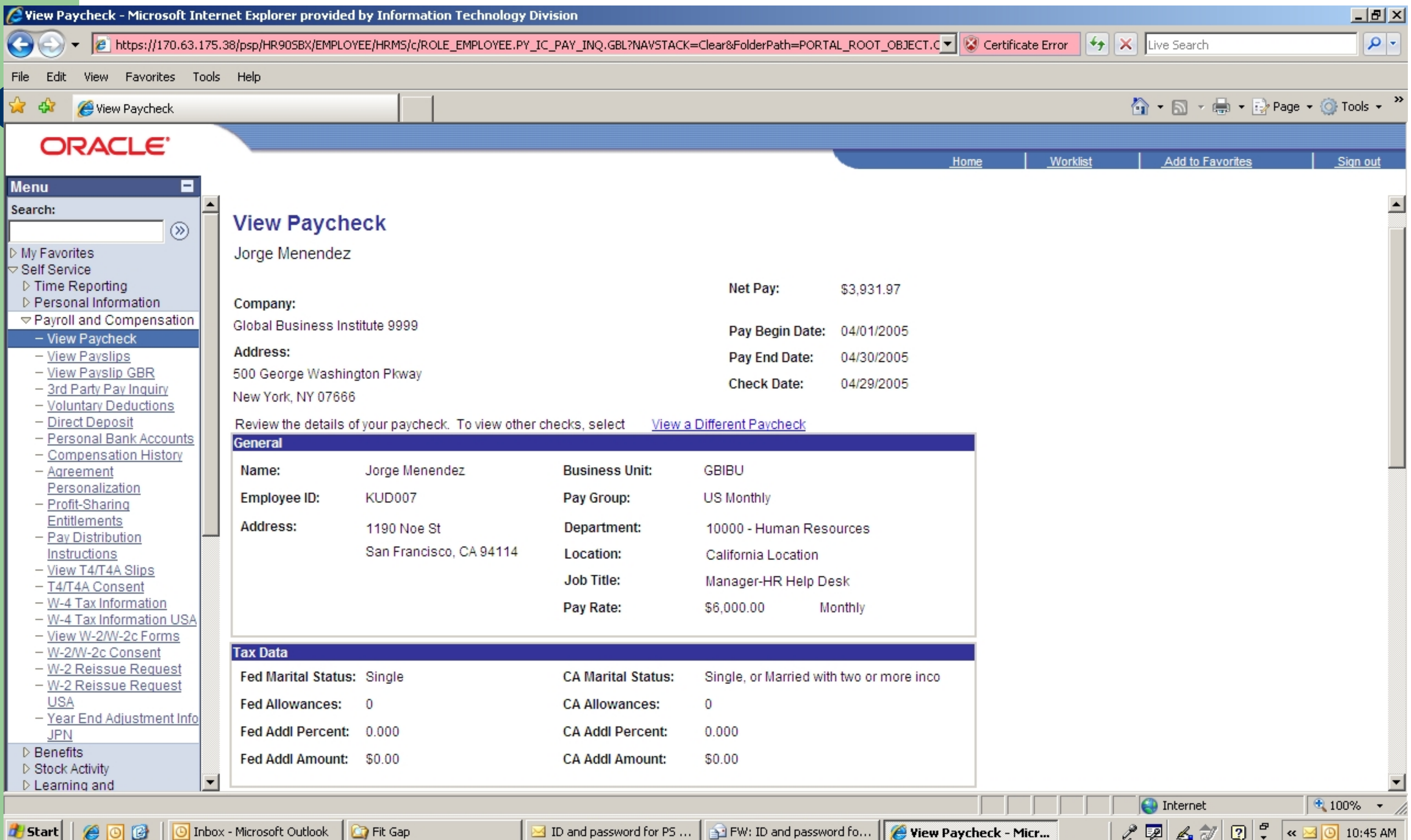


PeopleSoft 9.0
Paycheck Self-Service Search Page

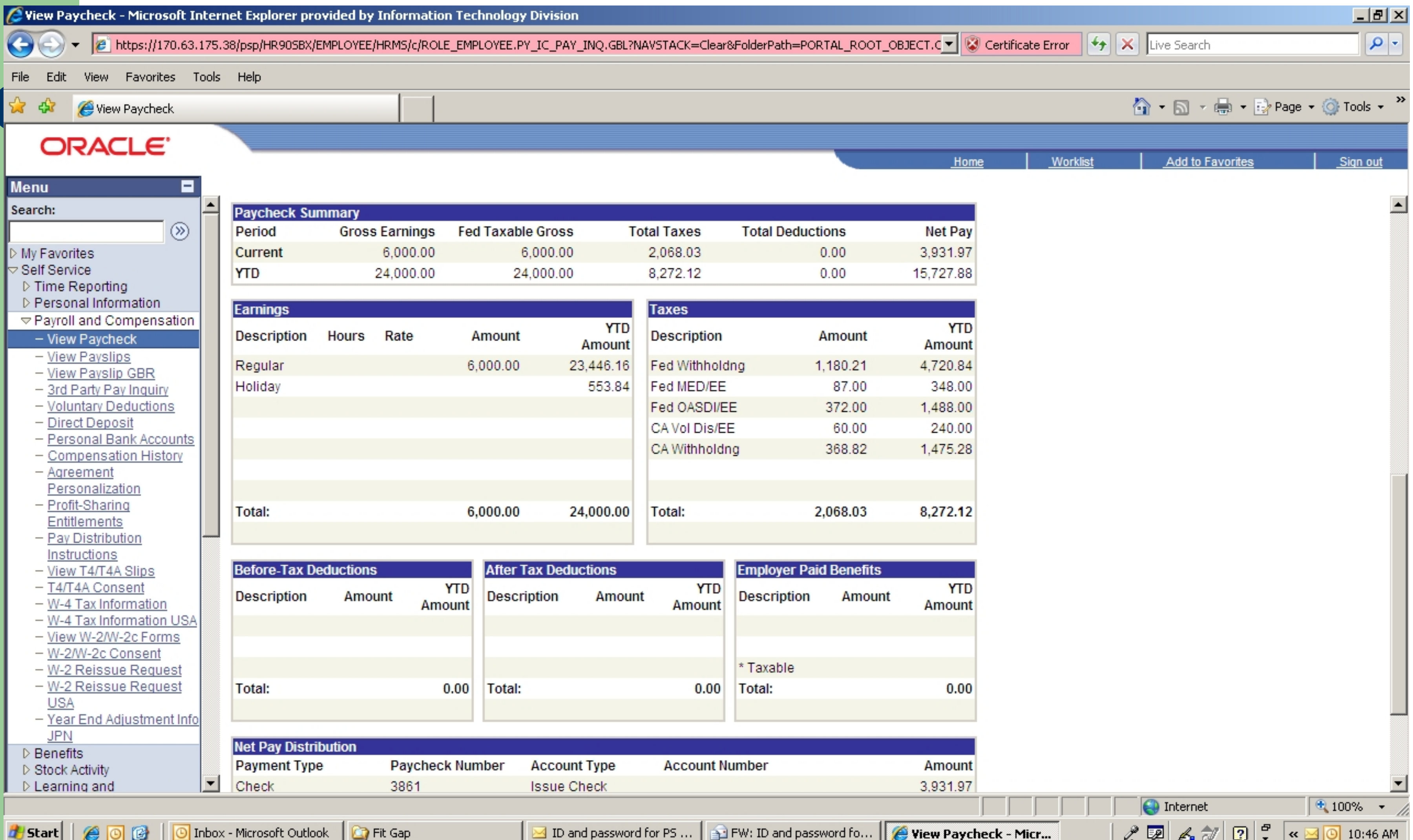


Check Date	Company	Pay Begin Date	Pay End Date	Net Pay	Paycheck Number	PDF File
2005-04-29	Global Business Institute 9999	04/01/2005	04/30/2005	$3931.97	3861	
2005-03-31	Global Business Institute 9999	03/01/2005	03/31/2005	$3931.97	3820	
2005-02-28	Global Business Institute 9999	02/01/2005	02/28/2005	$3931.97	3404	
2005-01-31	Global Business Institute 9999	01/01/2005	01/31/2005	$3931.97	2732	

PeopleSoft 9.0
Paycheck Self-Service View (1)



PeopleSoft 9.0
Paycheck Self-Service View (2)



Department Assistance

- Every department has a liaison for Upgrade Communication
- A cross selection of HR /Payroll and Time & Labor users volunteered to participate in Fit Gap Sessions
- Future PUG’s, Workshops and Change Management materials will help update progress

Fit - Gap

Fit-Gap Session Schedule			
	Date	**Time**	**Confirmed Departments**
Human Resources	March 18, 2009 (Wednesday) March 19, 2009 (Thursday) March 23, 2009 (Monday) March 24, 2009 (Tuesday) March 24, 2009 (Tuesday)	9:00am to Noon 9:00am to Noon 1:00pm to 4:00pm 9:00am to Noon 1:00pm to 4:00pm	EHS, SDW, SSA, WES, DOC DCR, DOR, EOL, CME, DOL, RGT, AGO, TRC, FSC, TRP
Time and Labor	March 25, 2009 (Wednesday) March 26, 2009 (Thursday) March 26, 2009 (Thursday)	9:00am to Noon 9:00am to Noon 1:00pm to 4:00pm	DCR, POL, BSB, DCP, LOT, MAC, RMV, SDW, DAC, EHS, AGO, EOL, RGT, TRC, HCC, DOC, SAO, EQE
Payroll	April 01, 2009 (Wednesday) April 02, 2009 (Thursday) April 02, 2009 (Thursday)	9:00am to Noon 9:00am to Noon 1:00pm to 4:00pm	SSA, AGO, TRC, DCR, TRE, RGT, POL, MAC, RMV, SDW, EHS, ETH, GCC, DOC, SAO, EOL

What’s Next

- Fit-Gap (In Process)
- Deliver Fit-Gap Summary Report
- Begin Construct Phase
  - Upgrade HR/CMS 8.0 to new 9.0 version
- Time & Labor Requirements for Pilot Project

Questions

SmartPlan

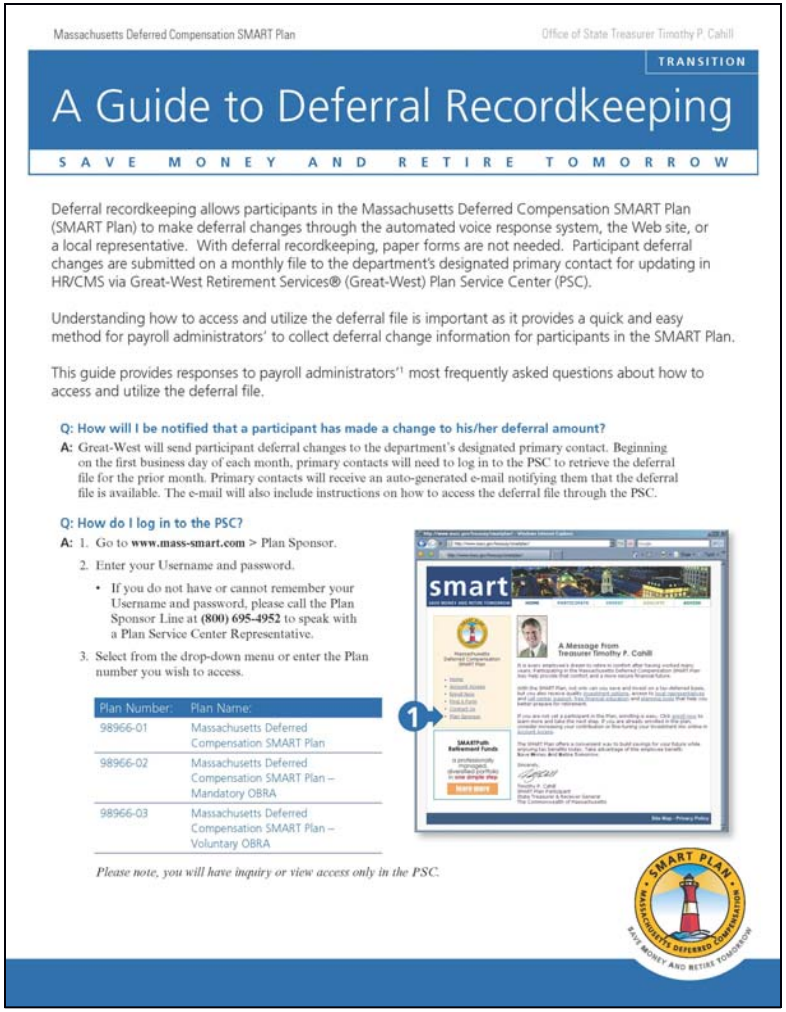
Rob Young

SMART Plan Agenda

Presented by Rob Young, Account Manager

- Deferral Recordkeeping
  - Information Guide
  - Deferral File Report
- OBRA
  - Information Guide
  - Required Enrollment Forms
- Questions

Deferral Recordkeeping Guide



Massachusetts Deferred Compensation SMART Plan

Office of State Treasurer Timothy P. Cahill

TRANSITION

A Guide to Deferral Recordkeeping

S A V E   M O N E Y   A N D   R E T I R E   T O M O R R O W

Deferral recordkeeping allows participants in the Massachusetts Deferred Compensation SMART Plan (SMART Plan) to make deferral changes through the automated voice response system, the Web site, or a local representative. With deferral recordkeeping, paper forms are not needed. Participant deferral changes are submitted on a monthly file to the department's designated primary contact for updating in HR/CMS via Great-West Retirement Services® (Great-West) Plan Service Center (PSC).

Understanding how to access and utilize the deferral file is important as it provides a quick and easy method for payroll administrators' to collect deferral change information for participants in the SMART Plan.

This guide provides responses to payroll administrators'[1] most frequently asked questions about how to access and utilize the deferral file.

Q: How will I be notified that a participant has made a change to his/her deferral amount?

A: Great-West will send participant deferral changes to the department's designated primary contact. Beginning on the first business day of each month, primary contacts will need to log in to the PSC to retrieve the deferral file for the prior month. Primary contacts will receive an auto-generated e-mail notifying them that the deferral file is available. The e-mail will also include instructions on how to access the deferral file through the PSC.

Q: How do I log in to the PSC?

A: 1. Go to **www.mass-smart.com** > Plan Sponsor.

2. Enter your Username and password.
   - If you do not have or cannot remember your Username and password, please call the Plan Sponsor Line at **(800) 695-4952** to speak with a Plan Service Center Representative.

3. Select from the drop-down menu or enter the Plan number you wish to access.

Plan Number:	Plan Name:
98966-01	Massachusetts Deferred Compensation SMART Plan
98966-02	Massachusetts Deferred Compensation SMART Plan – Mandatory OBRA
98966-03	Massachusetts Deferred Compensation SMART Plan – Voluntary OBRA

Please note, you will have inquiry or view access only in the PSC.

- Now available via your local rep or by calling (877) 457-1900, option 2.
- Provides payroll administrators with information about the deferral recordkeeping process and deferral file.

OBRA Information Guide

PARTICIPATE

OBRA Information Guide

S A V E   M O N E Y   A N D   R E T I R E   T O M O R R O W

Basic Facts About OBRA and the Massachusetts Deferred Compensation SMART Plan

As a part-time, seasonal or temporary employee of the Commonwealth of Massachusetts or a Massachusetts local government employer, you are required to participate in the Massachusetts Deferred Compensation SMART Plan (SMART Plan). The SMART Plan is an alternative to Social Security as permitted by the federal Omnibus Budget Reconciliation Act of 1990 (OBRA). OBRA, passed by the U.S. Congress, requires that beginning July 1, 1991, employees not eligible to participate in their employer's retirement program be placed in Social Security or another program meeting federal requirements. The SMART Plan meets those federal requirements.

Mandatory Contributions

As an OBRA employee, you must contribute at least 7.5% of your gross compensation per pay period to the SMART Plan. This contribution is deducted on a pre-tax basis, reducing your current taxable income. This means that you will not pay any tax on this money until it is distributed from your account.

Your human resources or payroll center representative will provide you with an OBRA Mandatory Participation Agreement. Please complete and return the form to either your human resources or payroll center representative.

Investment Option

All mandatory contributions to the SMART Plan will be invested in the Income Fund. The Income Fund is designed to protect your principal and maximize earnings. Your account will earn interest based upon the prevailing rates for this type of investment. Mandatory contributions may not be transferred out of the Income Fund.

Additional information regarding the Income Fund may be obtained online at **www.mass-smart.com** > Invest > Fund Fact Sheets or via the SMART Plan Service Center at **(877) 457-1900**.[1]

Administrative Fee

There is a fee of $18.48 per OBRA account, per annum, charged monthly. Fees are used to pay for administrative, recordkeeping, communication and investment education expenses.

Voluntary Contributions

You may make additional contributions (voluntary contributions) above the mandatory contribution of 7.5% of compensation per pay period. Any voluntary contributions that you elect to make may be invested among the SMART Plan's wide array of investment options and are freely transferable among options in accordance with the terms of the SMART Plan. OBRA voluntary contributions will not be charged an additional administrative fee.

To set up voluntary contributions or to learn more, please contact your local SMART Plan Representative at **(877) 457-1900**, option 2.[2]

Account Management

Once you are enrolled in the SMART Plan, you will have access to your account 24 hours a day, seven days a week through the Web site at **www.mass-smart.com** > Account Access or via the SMART Plan Service Center at **(877) 457-1900**.[1] All you need is your Social Security number (SSN) and Personal Identification Number (PIN). Your PIN will be mailed to your home as soon as you are enrolled in the SMART Plan.[3] Upon initial login to the Web site, please enter your SSN in the Username field. For security purposes, you will then be asked to create a personalized Username.

Through either the Web site or SMART Plan Service Center, you can:

- Obtain your account balance(s), allocations and transaction history
- Obtain investment option information and returns
- Order a new PIN or personalize your PIN
- Update your beneficiary information as needed

Statements

You will receive an annual statement in January of each year showing contributions, earnings, fees, distributions and the total value of your account. Please review your statement carefully to ensure your information is correct. It is extremely important that you keep the Plan administrator advised of your current address.

To update your address, call the SMART Plan Service Center at **(877) 457-1900**. You can also go to **www.mass-smart.com** > Find a Form. Click on the link OBRA Mandatory Personal Information Change Request. Mail or fax the completed form to the address or fax number provided on the form.

Distributions

Distribution of your SMART Plan benefits can only be made upon:

- Severance from employment
- Your death

Severance from employment occurs because of your voluntary or involuntary termination of employment. There is no early withdrawal penalty for taking a distribution of your account upon separation of service, regardless of your age. If you

SMART PLAN MASSACHUSETTS DEFERRED COMPENSATION SAVE MONEY AND RETIRE TOMORROW

- Available at www.mass-smart.com>Participate >OBRA or via your local representative.
- Provides employees with basic facts about OBRA and the SMART Plan.
  - Mandatory Contributions
  - Investment Option
  - Administrative Fees
  - Distributions

OBRA Reminder

- All temporary, seasonal or part-time employees classified as OBRA are required to complete a Participant Enrollment form
- The enrollment form provides Great-West with
  - Participant Address
  - Participant Date of Birth
  - Beneficiary Names

Enrollment Form

Participant Enrollment
Governmental 457(b) Plan

Massachusetts Deferred Compensation SMART Plan - Mandatory OBRA **98966-02**

Participant Information

Last Name | First Name | MI

Social Security Number

Address - Number & Street

E-Mail Address

City | State | Zip Code

❑ Married ❑ Unmarried ❑ Female ❑ Male

Mo Day Year — Date of Birth

Mo Day Year — Date of Hire

( ) Home Phone

( ) Work Phone

Payroll Information

To be completed by Representative:

Division Name

Division Number

Investment Option Information (applies to all contributions) - Please refer to your marketing communication materials for information regarding each investment option.

I understand that funds may impose redemption fees on certain transfers, redemptions or exchanges if assets are held less than the period stated in the fund's prospectus or other disclosure documents. I will refer to the fund's prospectus and/or disclosure documents for more information.

INVESTMENT OPTION NAME	INVESTMENT OPTION CODE	
The Income Fund	MELINC	100%
MUST INDICATE WHOLE PERCENTAGES		=100%

Plan Beneficiary Designation

This designation is effective upon execution and delivery to Service Provider at the address below. I have the right to change the beneficiary. If any information is missing, additional information may be required prior to recording my beneficiary designation. If my primary and contingent beneficiaries predecease me or I fail to designate beneficiaries, amounts will be paid pursuant to the terms of the Plan Document or applicable state law.

You may only designate one primary and one contingent beneficiary on this form. However, the number of primary or contingent beneficiaries you name is not limited. If you wish to designate more than one primary and/or contingent beneficiary, do not complete the section below. Instead, complete and forward the Beneficiary Designation form.

Primary Beneficiary

% of Account Balance	Social Security Number	Primary Beneficiary Name	Relationship	Date of Birth
100.00%				

Contingent Beneficiary

% of Account Balance	Social Security Number	Contingent Beneficiary Name	Relationship	Date of Birth
100.00%				

Participation Agreement

Withdrawal Restrictions - I understand that the Internal Revenue Code (the "Code") and/or my employer's Plan Document may impose restrictions on transfers and/or distributions. I understand that I must contact the Plan Administrator/Trustee to determine when and/or under what circumstances I am eligible to receive distributions or make transfers.

Compliance With Plan Document and/or the Code - Participation in this Plan is mandatory. A deduction will be taken from your wages and invested on your behalf based on your employer's Plan Document. I agree that my employer or Plan Administrator/Trustee may take any action that may be necessary to ensure that my participation in the Plan is in compliance with any applicable requirement of the Plan Document and/or the Code. I understand that the maximum annual limit on contributions is determined under the Plan Document and/or the Code. I understand that it is my responsibility to monitor my total annual contributions to ensure that I do not exceed the amount permitted. If I exceed the contribution limit, I assume sole liability for any tax, penalty, or costs that may be incurred.

Incomplete Forms - I understand that in the event my Participant Enrollment form is incomplete or is not received by Service Provider at the address below prior to the receipt of any deposits, I specifically consent to Service Provider retaining all monies received and allocating them to the default investment option

Account Corrections - I understand that it is my obligation to review all confirmations and quarterly statements for discrepancies or errors. Corrections will be made only for errors which I communicate within 90 calendar days of the last calendar quarter. After this 90 days, account information shall be deemed accurate and acceptable to me. If I notify Service Provider of an error after this 90 days, the correction will only be processed from the date of notification forward and not on a retroactive basis.

Form 1 GWRS FENRAP 3121 01/31/08 Page 1 of 2
TAYO/151014429
Great-West Retirement Services® refers to the products and services of Great-West Life & Annuity Insurance Company and FASCore, LLC.

ADMIN FORMAT
D02:120507

- All forms are available at www.mass-smart.com>Find A Form.
- Forms may be returned by mail or fax as indicated on each form.

Questions?

Thank you

SmartPlan Payroll Administrator Changes

Contact Silas Shah at CTR for any changes to the department payroll contact.

Deductions by Percentage

- *Reminder of Feature offered by Smart Plan*
- *In General Deductions, choose **Percent of Federal Gross**. Make the choice from the deduction Calculation Routine drop down menu.*
- Will apply to all job records.
- Do not choose any of the other options

Home | Worklist | Help

Home > Compensate Employees > Maintain Payroll Data (US) > Use > **General Deduction Data**

New Window

General Deduction Data

Vasu,Retirement

EmplID: PML1104

Empl Rcd Nbr: 0

Company: COM Commonwealth of Massachusetts

General Deduction — Find | View All — 1 of 1

***Deduction Code:** DCOMPL Deferred Comp - Last 3 years E

Deduction Details — Find | View All — 1 of 1

***Effective Date:** 03/07/2008

Take on all Paygroups ☑

***Deduction Calculation Routine:** Percent of Federal Gross

Deduction End Date:

Deduction Rate or %:

Loan Interest %:

Flat/Addl Amount:

Goal Amount:

Current Goal Balance:

Ded. stopped by Self Serv User ☐

This data was last updated by Online Opr **Data last updated on** 03/07/2008

Save | Return to Search | Update/Display | Include History | Correct History

2009 Payroll Reminders

Kevin McHugh

W4 - Exempt Employees

- Final Notices for Exempt W4 Employees are going out to CFO's.
- Review HTAX103 - W-4 Exempt Report.
- Remember to remove your employees from the report insert a new row with an Effective Date in 2009

Qualified Parking

- Monthly Exclusion Amount for Parking is $230
- Processed one month in arrears (January's benefit is processed in February)
- Use the CIW and reconcile your employees balances.
- PKF and PRF calculate both federal <u>and</u> state withholding amounts.
- The use of *state* earnings codes PKS and PRS is prohibited.

Retirement 2000

Massachusetts Department of Revenue allows employees to receive the first $2000 in combined Retirement Deductions and Medicare Tax to be excluded from MA Taxable Gross Wages. So from the start of the new calendar year (Jan) up until this $2000 threshold is met employees will have less MA Taxable Gross to deduct taxes from, thus less MA taxes taken. Employees will see a gradual increase in their MA tax withholding (sometimes up to 2 payperiods) as they go over the $2000 threshold.

New Hires

<u>NEW HIRES</u> –**-** Reminder:

- The United States Customs and Immigration Services has issued a new *Form I9, Employment Eligibility Verification* to be used during the New Hire process. Employing departments should note the changes to List A for acceptable identity and work authorization papers. See <u>http://www.uscis.gov/portal/site/uscis</u>
- **Report any SSN problems to the helpdesk immediately**
- **DO NOT, DO NOT, DO NOT bypass HRCMS edits using an invalid SSN**

WARNING:

DO NOT use invalid SSNs

Payroll Close / Open Timeline

Kevin McHugh, CTR

Key Dates

- Prior to June 1: Identify any FY09 COA changes, e.g. program codes or appropriation changes
- May 1st- Start entering PH documents
- June 1st – Position Rules Roll Departments can begin requesting FY09 Rules
- June 1st - PH over $25K requires ANF approval for Executive Branch Departments

Key Dates

- June 19- Last day for HR transactions or Garnishment transactions in HRCMS for PPE June 20
- June 22- Last Day for posting Time for PPE June 20
- June 23- Last day for making changes in Labor distribution in LCM for PPE June 20

Key Dates- Split Year

- June 30- Last day for entering PH
  - Last Day for PRRV (Cash Cut off of 7/1) for FY09
- July 3 – Last Day for HR transactions
- July 6 – Last Day for Time and Attendance Entry in HRCMS
- July 7 – Last Day for LCM changes

Mass Rules Roll - MPOAA

- On June 1st, CTR will either approve or reject all pending POAA Rules requested for FY09 Activity and will Process the MPOAA program. Any new rules needed for FY09 Activity can be entered after June 2nd.
- New draft rules for FY10 will be in the LCM document catalog

Split Year Proration

- Payroll will be based on 7 business days in FY09 and 3 days in FY10
- All Prior Pay Period postings will post to FY09
- Job Actions will create a time slice which will affect the proration

Split Year Considerations

- All Sick and Vacation buy outs will post to FY09 if processed during Split year
- Details will be included in the Open / Close Instructions

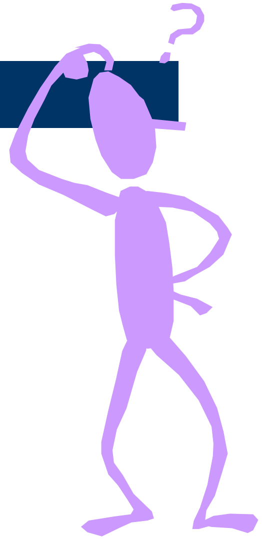
Accounts Payable

- Payroll Holds are object code based so departments need to encumber based on estimated payroll dollars i.e. A01,A08,B02, etc.
- All PH documents will workflow to CTR Payroll in order to assist departments in proper PH documents set-up.
- The PH document must include a justification in the Comment.

HR Reminder:

- Be careful when rehiring employees whose HRCMS history (Obj Code, Account, Unit) shows Accounting information no longer valid in the new FY.
- It must be corrected as of July 1 in the new FY.

Questions?



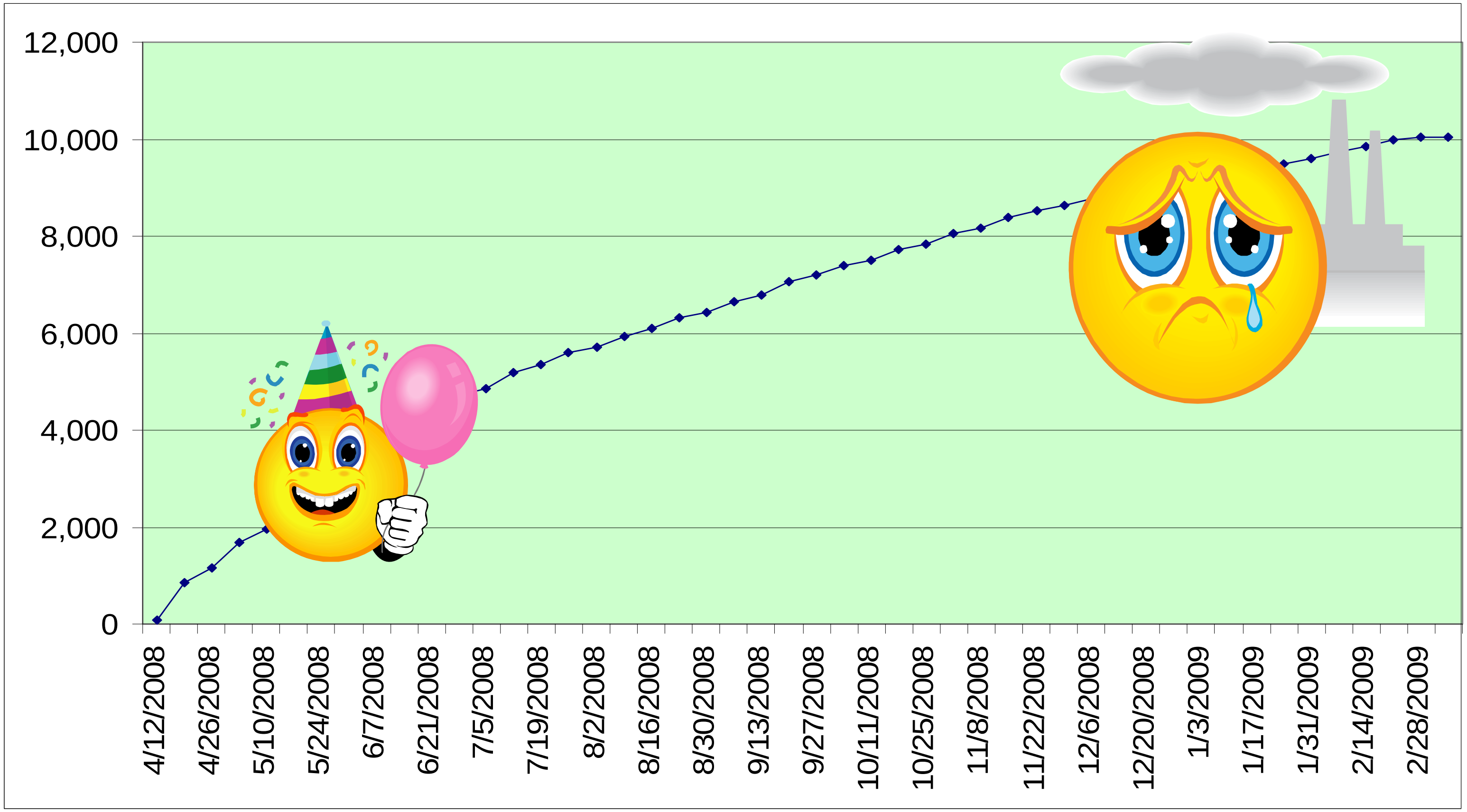
PayInfo

Kevin McHugh

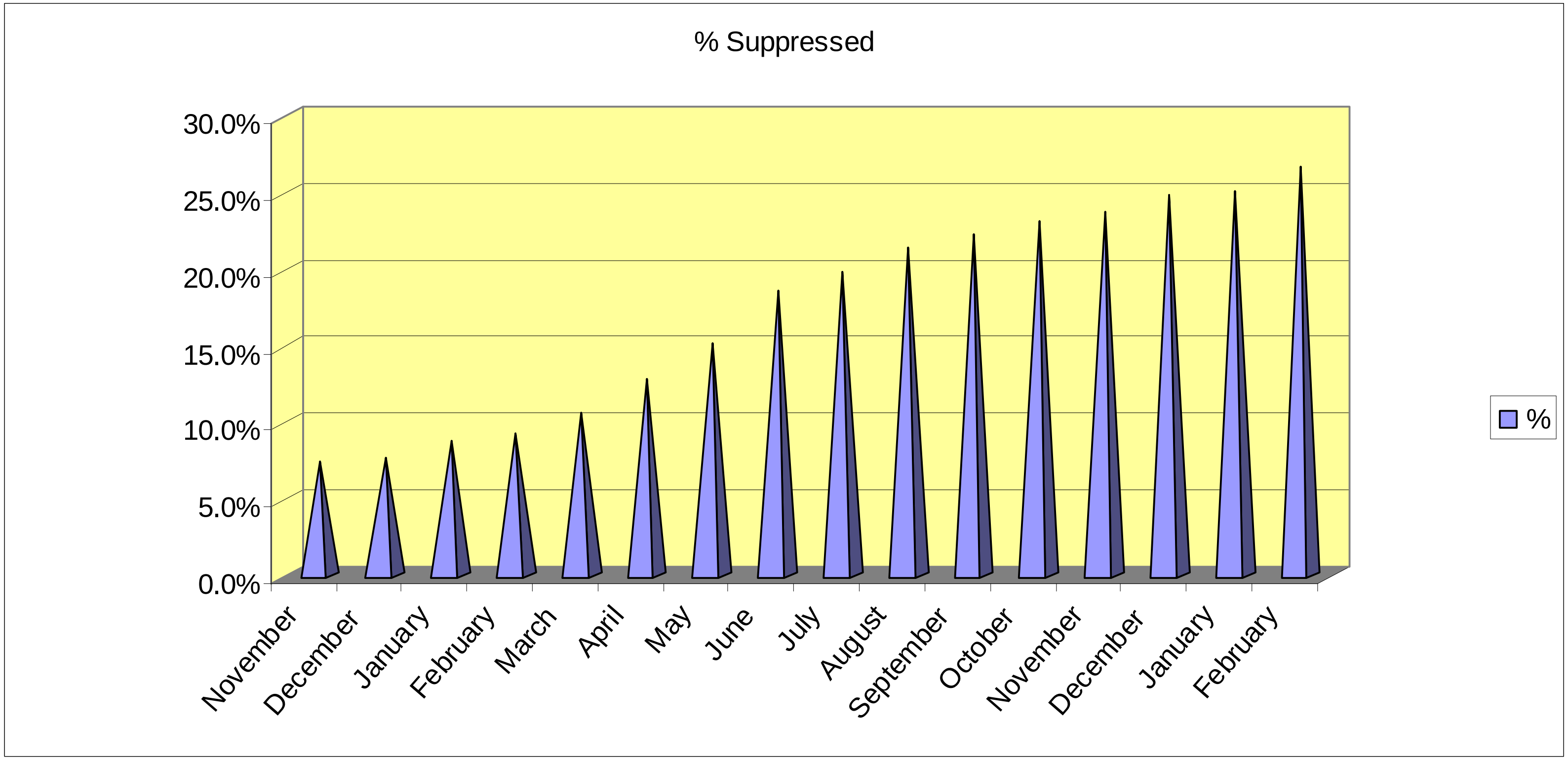
PayInfo

Kevin McHugh, CTR

Employees Who Have Gone Green Through PayInfo



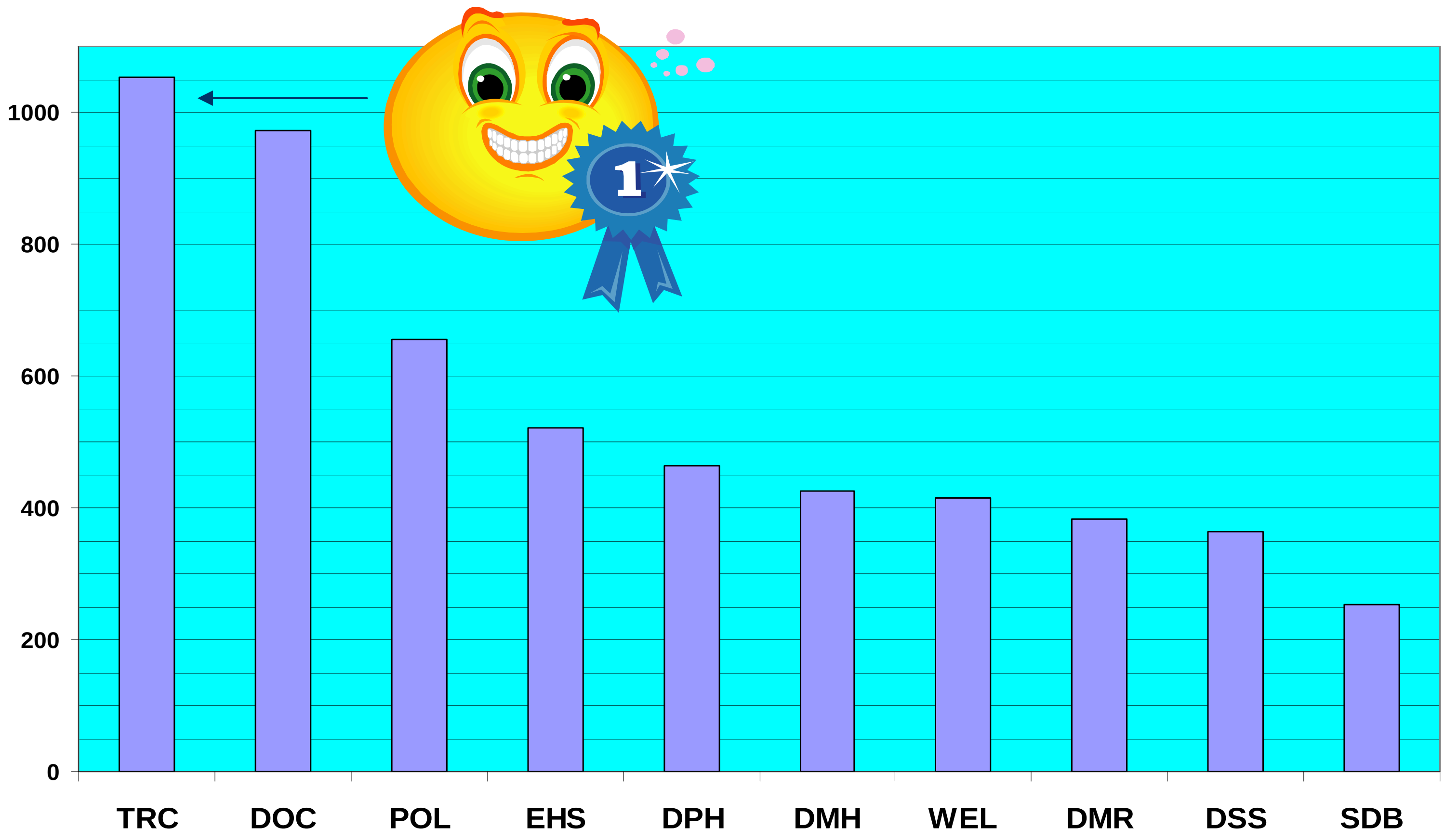
Including All Suppression (online and batch)



The rate of suppression has started to level

- Need your ideas to reach 100% goal
- Only you can do this

Top Ten Departments



Questions?